

PROJECT CHARTER

Date Created:

Date Last Modified:

Remember – this is a living document! Make changes and update as necessary

Organization:	
Project Name:	
Project Leads:	
What are we trying to accomplish?	
Defining the Problem – Background and Reason for Effort (What's wrong and why should we do this now?)	
<ul style="list-style-type: none">• Create urgency. Why should we do this and why now?• How is this problem preventing us from achieving greater organizational goals? How does it align with organizational strategies?• What is the better future that the change will accomplish?<ul style="list-style-type: none">○ What are the current gaps in performance and how stakeholders/customers impacted? (Opportunity to connect head to heart)○ What are the consequences of not doing this now? <p><i>Note: This information should begin to formulate your initial project messaging and help you to manage the people side of change by helping them to see a need (what is dissatisfying about current state), a better future (create desire to be different), and the consequences of avoiding the change.</i></p>	
Aim Statement (How good do we want to be and by when? Remember SMART = Specific, Measurable, Ambitious, Relevant, and Timebound)	
<ul style="list-style-type: none">• Develop the Aim Statement with a team – make it SMART, focusing on how good you want to be and by when!• Consider the following regarding the appropriate scope of your project:<ul style="list-style-type: none">○ How long is the project? Is there a specific deadline? If so, what can you reasonably accomplish by the deadline?○ What resources are available to invest in the project?○ Is data for the Aim (outcome measure) existing and/or easily accessible?	
What changes can we make that will result in improvement?	
Enumerating theories for change and generating/identifying change ideas (Driver diagrams, process flow maps, observations, etc.)	
<ul style="list-style-type: none">• Identify dates/times for team to participate in activities that will surface change ideas. Consider the following to generate/identify areas of change focus and change ideas:<ul style="list-style-type: none">○ Develop a Driver Diagram (See Driver Diagram Development Tool)○ Develop a Process Flow Map (See Process Flow Mapping Tool)○ Process Observation (See Process Observation Tool)• Once completed, add documents to the Charter.	

Possible Roles:

Sponsor – Executive/Sr. Leader with formal authority and ownership for the process being improved; expected to actively and visibly participate throughout the process

Champion – Leads project identification and prioritization; ensures projects are aligned with business goals/strategy

Project Lead – Ensures meetings are coordinated and team members are invited; facilitates team members through change process; ensures opportunities are available for team members to communicate with stakeholders/leaders

Process Expert – Front-line staff member familiar with the day-to-day process/system being improved

Subject Matter Expert – Provides information/expertise necessary to improve process/system

Coach – Facilitates team leads and/or teams by providing change management skills, resources and tools for learning and application

Defining Responsibilities:

Responsible: The person who is assigned to do the work

Accountable: The person who makes the *final decision* and has *ultimate ownership*

Consulted: The person who must be consulted *before* a decision or action is taken

Informed: The person who must be informed that a decision or action *has* been taken

Team Logistics

Meeting frequency, ground rules, etc.

- How often will you meet? (If possible, protect time by scheduling recurring meetings)
- Where/how will you meet?
- Who will serve as notetaker and recapping action items at the end of the meeting
- Who will send meeting agendas/minutes/reminder notices
- Who will facilitate meetings and keep time?
- What are the team's ground rules?